

# Project Closeout Report

**Project Name:** Master Client Index

**Agency:** Department of Human Services

**Business Unit/Program Area:**

**Project Sponsor:** Maggie Anderson, JoAnne Hoesel, Brenda Weisz

**Project Director:** Jenny Witham, Mariah Tenamoc

**Project Manager:** Brenda Bulawa

Project Objectives	Measurements	
	Met/ Not Met	Description
Enumerate the clients contained within the ES100000 data source into the MCI product.	Met	The initial data load consisted of 1,205,183 records.
Integrate the use of the MCI into current system operations to reduce creation of new duplicate client records and continued quality improvement of existing records.	Met	All ES100K client records were uploaded into the MCI. Phase II of this project implemented search for Single Plan of Care (SPOC). By viewing all MCI client records by program this allows county workers to more accurately choose the correct client to add to a new case. Whereas in the ES100K all occurrences a client was known to were not visibly available in a search results set. A deterministic search was utilized in the ES100k where the MCI has expanded capabilities to return the correct results using probabilistic matching.
To provide for cross-program analysis led by the Department's Research Division.	Met	<p>For several years, research staff in the Department have been unable to match clients across service delivery systems with ease and relative accuracy. This was due to the absence of a primary identification key that was common to all systems. Seven source systems have contained a common identifier, but the remaining multiple systems had individual identifiers common to the specific service delivery program.</p> <p>In 2006, the Division of Mental Health and Substance Abuse indicated a need to find a method of matching consumers across service delivery programs in an attempt to determine outcomes associated with substance abuse treatment episodes experienced by consumers. Data analysts from the various divisions of the Department met, as well as the Director of Information Technology Services, to discuss possible solutions. The solution sought was to benefit not just Substance Abuse Treatment reporting, but the Department's ability to access cross-program data for outcome reporting.</p> <p>To facilitate the need stated above, Initiate Systems was engaged to construct a Master Client Index for consumers across the Department's multiple service delivery systems. The project objective, "to provide for cross-program analysis led by the Department's Research Division [Decision Support Services]" is yet to be tested. Go-live of the project provided the impetus for achieving the objective and the first of two components with which to accomplish the objective. The second component is that of building a data warehouse of data from all of the source systems that will be identified in the Master Client Index. Theoretically, Decision Support Services has the analytic resources to do cross-program analysis. These include SAS, SPSS, and Access. Pragmatically, to take greater advantage of the Master Client Index and the data warehouse, research analysts will be trained in Cognos and will develop report templates to allow multiple users easy access to a variety of data/reports.</p>

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To be better prepared for emerging e-Health initiatives by providing a secure mechanism to interact with clients and private sector providers regarding client health information.	Met	By virtue of loading DHS client information into the MCI, this allows the clients to be found via a "record locator" service from appropriate outside entities. This alone readies DHS to participate in real time data exchanges.
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Schedule Objectives			
Met/ Not Met	Scheduled Completion Date	Actual Completion Date	Variance
MET	04/08/09	6/19/09	16% Over

Budget Objectives			
Met/ Not Met	Baseline Budget	Actual Expenditures	Variance
MET	\$815,393	\$836,245	2.5% Over

Major Scope Changes	
<ul style="list-style-type: none"> <li>Initiate Master Data Service™ upgrade and reconfiguration of v7.5 to v8.1.</li> <li>SOND ITD support and code updates due to the Initiate Master Data Service™ upgrade.</li> <li>Add additional attributes to the Initiate Master Data Service™.</li> <li>SOND ITD to support and reconfigure coding for new attributes.</li> </ul>	

Lessons Learned
<ul style="list-style-type: none"> <li>Apart from the efforts made to help everyone to understand the steps needed to implement each source system program search, there were still staff who felt decisions were being made without consideration for their programs. Further efforts were needed to educate stakeholders throughout the project duration.</li> <li>Needed a more basic review of project and product dictionary for stakeholders.</li> <li>The ES100K was much more complex than originally believed. We also found that the documentation was inadequate.</li> <li>Stakeholders across programs had to have their concerns addressed about sharing and/or suppressing data.</li> <li>Agreed that a newly hired project team from Initiate would be acceptable in the implementation, however, inexperience caused delays in requirement gatherings, configuration and implementation.</li> <li>A MCI product manager should have been assigned at the beginning of the project.</li> <li>DHS should have assigned someone to shadow the business analyst and data steward to support the primary's absence.</li> <li>During project kickoff discuss and accept meeting ground rules for the project duration.</li> <li>Analysis of detailed business requirements was never completed.</li> <li>Further analysis of current technical architecture to help prevent issues in future implementations.</li> <li>The Statement of Work had ambiguous language and needed to be more defined.</li> <li>Need to require stakeholders to perform a requirements/technical discussion meeting onsite so internal business process decisions/dependencies can be worked through prior to a project kickoff meeting.</li> <li>Training needed to be focused on the needs of DHS and not those of technical consultants.</li> </ul>

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## Success Story

- Educated stakeholders and increased their knowledge about the project and product through presentations on algorithms and on brokers.
- Identified, using the probabilistic comparison algorithm of the MCI, otherwise missed member record duplicates within the ES100K.
- Created a common demographic file of the ES100K participating programs, as well as VRIS. This will enable DHS to have a common view of clients across programs that do not share an ES100K ID.
- Assisted county workers to more quickly and accurately select a client during an inquiry and/or registration. By sharing address and phone information county workers are able to get more complete view(s) of a client.
- Brought together Steering committee members who showed great commitment throughout the project. The Steering Committee was composed of policy and planning, research, and IT. Nine (9) programs were represented in the implementation of this project.
- Assigned to the project, a business analyst experienced in soft skills, communications and research, and who had a great capacity for understanding IT and DHS jargon, which enhanced the experience for all stakeholders.